


## Memorandum

TO: Open Society Network  
FROM: Chris Stone   
DATE: February 27, 2013  
SUBJECT: Shared Frameworks

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I am pleased to distribute this memo describing the launch of the “shared frameworks” through which all entities within the Open Society Foundations can contribute to a discrete set of specific, common goals.<sup>1</sup> Each shared framework will be built around a high-priority goal achievable in a limited time (we guess four to eight years) to which multiple programs, foundations, offices, and departments can contribute.

The shared framework itself will be a short document approved by the Global Board that describes the goal and provides guidance on the kinds of strategies that are expected to contribute to the goal. Over time, as programs and foundations contribute to the framework, the document will grow and be revised to describe the various initiatives that we are taking to achieve the goal. This memo describes the *why*, *what*, and *how* of shared frameworks: our purpose in launching them, the process we will follow for nominating and developing them, and next steps for how to get involved.

I am indebted to the members of the Strategy-Budget-Performance Design Team, who have devoted countless days over the last seven months to conceive, debate, and refine the idea and design of shared frameworks as well as the process by which they will now be taken forward.<sup>2</sup>

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<sup>1</sup> The Open Society Foundations bring together many kinds of entities. These include regional and national foundations, geographic programs, thematic programs (including some focused on themes, some on groups of people, and some on instruments or methods), advocacy offices, central departments such as communications and finance, and separate legal entities such as the Soros Economic Development Fund.

<sup>2</sup> The Strategy-Budget-Performance (SBP) Design Team conducted its work from July 2012 to February 2013. Marine Buissonniere chaired the team, which was composed of staff members from across the Foundations from a wide range of thematic, geographic, and operational programs. In addition to Marine, the members were: Joe Behaylo, Neil Campbell, Darius Cuplinskas, Zeljko Jovanovic, Emily Martinez, Diana Morris, Binaifer Nowrojee, Cathy Ross, Dan Sershen, Ramesh Singh, Rob Varenik, and Ammar Abu Zayyad. The shared frameworks represent only a portion of the product of the design team, which reexamined aspects of the procedures used in the Foundations to develop strategies and budgets, and to assess performance against those. My original charge to the team was to address three questions: (1) How can the Open Society Foundations come together in ways that enable us to be most effective without overly

## Why Shared Frameworks?

The purpose of the shared frameworks is to build a routine of creative, engaging, and productive collaboration across our network, a routine that allows us to seize opportunities to make a big difference on issues to which the Foundations are deeply committed. On a wide range of issues, we want to invite and implement the original ideas, rigorous thinking, sound analysis, thoughtful preparation, and creative integration that can make a meaningful difference in a discrete period of time. When we take on a big ambition, we want to take full advantage of the skills, expertise, and experience across our network and achieve all that we can. Each shared framework should help make us even more than the sum of our parts.

Collaboration is nothing new to the Open Society Foundations. Months before I took up my new role here as president, I watched a dozen or more programs and foundations across the network mobilize in response to George Soros's call for action on Burma, helping reformers there widen the opening for democracy. And, on a smaller scale, I frequently see collaborations on individual grants and strategies that are held in common by two, three, and sometimes four separate programs and foundations, often facilitated by shared staff positions.

### Shared Frameworks: An Overview

- *Ambition:* Each shared framework identifies a high-priority goal achievable in a limited time to which multiple programs and foundations contribute their own strategies, allowing the Foundations to bring many assets to bear simultaneously.
- *Adaptability:* We will refine the processes for nominating, developing, and implementing shared frameworks as we go; adapting and improving routines as we learn what works.
- *Flexibility:* An approved shared framework will typically continue for four or more years, but it will likely see programs and foundations join, exit, or alter their contributions during that time.
- *Accountability:* Assessments of active shared frameworks will occur at six-month intervals with comprehensive reviews engaging members of the Global Board every two years; results will be shared internally across the network as well as with external partners.

The shared frameworks build on these common experiences of successful collaboration. We should be able to catalyze Soros-like attention to opportunities spotted by anyone across the network and mobilize our resources to powerful effect more often. Not only should we notice when our individual strategies overlap, but we should build some of those strategies together from the start. Shaping strong, ambitious strategies that unite multiple programs and foundations in a common

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centralizing our work? (2) How can we sustain and grow the impact we make in this era of limited resources? (3) How can we better uphold the open society values of inclusion, transparency, participation, and accountability with each other and with external partners and allies in the very process of our work? As the first of several design teams that have contributed to the transitions currently underway at the Open Society Foundations, the team also pioneered an approach to collective thinking and leadership that continues to inspire other teams across the organization.

cause should be a routine part of the work of the Foundations, not an extraordinary or disruptive event.

## How Does the Shared Framework Process Work?

A shared framework begins with an idea suggested by anyone in the network: any staff member, board member, or advisor. You place your idea into the Souk, an open, web-based platform, where others across the network can comment on the idea, suggest changes, or take it further. If the idea gains support and is approved by the Global Board for implementation, the process ends several years later with a full review of what we've achieved and what we've learned.

### **The Souk: An Online platform supporting Inclusive, Transparent, Accessible Participation**

The online platform where ideas for shared frameworks begin is called the Souk—an Arabic word for marketplace or bazaar—a community space for displaying and selecting wares, seeing what else is on offer, and making connections and valuable exchanges. The Souk is purposefully hosted on a web-based platform in recognition that inclusive participation in the development of new ideas requires an open, accessible, and transparent platform available to all members of the network. Participation in the Souk should build on and reinforce the best kinds of collaboration that are already taking place in the network, while also encouraging the emergence of new ideas.

Only a few of the ideas suggested as shared frameworks will develop all the way into fully funded efforts, but even if an idea merely generates discussion on the Souk, the ideas can contribute to the initiatives of individual programs and foundations, or may spur smaller scale collaborations. The full process can best be understood in two parts: nomination and development, followed by implementation and assessment.

### *Part I: Shared Framework Nomination, Sponsorship & Development in Four Phases*

- **Phase I: Concept Sharing and Discussion in the Souk:** Using a simple template, any Open Society staff member, board member, or fellow from across the Foundations can nominate a potential shared framework, learn about ideas nominated by others, interact with the set of circulating ideas, and follow the progress of nominations at different stages of development.
- **Phase 2: Sponsorship and Development of Proposals:** Concepts for shared frameworks circulating in the Souk are considered for development into proposals when at least three members of the Senior Management Committee (SMC) have signed on as sponsors. The president then assigns a lead or leads among those contributing to the discussion in the Souk. Sponsorship by multiple SMC members affirms that a concept has high-level support and commits the sponsors to engage with the concept development, vetting, and implementation. Requiring only three sponsors provides multiple pathways for an idea to gain attention. The lead or leads then take responsibility for coordinating concept development, honing goals, mapping work on the issue, conducting baseline

research to inform the intervention: turning the idea into a fleshed out proposal. Draft proposals will be available in the Souk for a minimum two-week period following sponsorship.

- Phase 3: Selection & Development of Frameworks and Strategies: Once the lead or leads believe a proposal is ready for consideration, it moves to a standing Review Committee appointed by the president, which appraises all proposals, and recommends a number to be authorized by the Global Board for fuller development. This Review Committee could include junior-, mid-, or senior-level staff, as well as Global Board members and fellows. Service on this committee would be for up to two terms of one-year each on a staggered basis.
- Phase 4: Vetting “Charrette” and Final Global Board Approval: Proposals authorized by the Global Board for full development then begin the final phase before implementation, ending with a strategy charrette where possible goals and associated strategies are refined, combined in creative ways, and rigorously reviewed by the charrette’s jury. The charrette process will result in a shared framework with specific goals and exemplary strategies, produced through an interactive event in which many people across the network can participate with experts in the relevant fields and places. The product of the charrette is then reviewed by the Global Board which allocates a budget to the framework.

## *Part II: Implementation and Assessment*

We know less at this point about how the shared frameworks will be implemented, but we imagine a process curated by a central team, responsible for coordinating and monitoring all of the active frameworks. We imagine periodic invitations to programs and foundations across the network to propose contributions to the shared frameworks after their approval by the Global Board. A central budget will supplement the funds and other resources that individual programs and foundations bring with their proposed contributions, permitting even those programs with very small budgets to contribute. The vision is one in which many parts of the network are pursuing the same concrete goals using a wide array of strategies. The strategies must not work at cross purposes, but they also can proceed on different theories, operating in tandem, or independently. The point is not to follow a single course, but to approach a common goal along many different avenues at once.

Once a framework is launched, representatives of the programs and foundations contributing will gather twice a year to assess progress, compare experiences, adjust strategies, and revise their plans together. Once every two years, a larger assessment will be conducted with experts external to our activities. Our aim is to achieve significant results within four years. At the end of that time, work on the framework will be completed, though the design team that conceived this process imagines that some frameworks might be renewed for a further four years.

## **Next Steps**

More detailed information is available on the Souk, a [new KARL community](#) that will serve as the initial online platform for this effort. This online community, which houses the Souk, contains useful tools and reference materials for participating in the development of shared frameworks, including:

- background materials produced by the Design Team
- a template for proposing a new shared framework
- instructions and updates on the roll-out process
- links to related KARL communities such as [OSF Strategy Reviews](#)
- a [Help Desk](#) and wiki page containing answers to [Frequently Asked Questions](#)

To join the Souk on KARL, [please click here](#), or search for the Souk on KARL, and select the green “Join” button on the community’s Overview page.

## **Learning As We Go**

The Shared Framework process will be one of ongoing learning, adaptation, and adjustment. There will be immediate opportunities for network participation in both the development of shared frameworks themselves and the development of the process for generating them, starting with a Souk consultation meeting in March and continuing with a series of instructional consults, webinars, conference calls, and blog postings that will draw from and highlight participant needs, priorities, and feedback. The process will be coordinated in 2013 by Johanna Chao Kreilick in my office, and we will learn together over time how to support the process as it grows increasingly robust, including the important issues of curation, budgeting, assignment of leads, and approaches to assessment.

I invite and look forward to your active participation as we bring the shared frameworks to life.